

## POSITION DESCRIPTION A

Employee Name:

Agency: **Board of Water and Soil Resources (BWSR)**

Classification Title: **Office and Administrative Specialist, Senior**

Working Title: **Office and Administrative Specialist**

PCN: 01111430

Prepared By: Al Kean, Sharon Doucette

Acknowledgement that Position Description accurately reflects current position:

---

Employee

---

Date

---

Supervisor

---

Date

## POSITION PURPOSE

The position provides a broad range of high-level administrative support to the Conservation Easements and Engineering Sections for the Reinvest in Minnesota Reserve Program and associated partnerships, the Local Road Wetland Replacement Program, wetland banking, applicable Clean Water Fund programs, and other BWSR programs and functions supported or performed by staff of these BWSR sections. Areas of expertise supported include conservation easement acquisition and conservation practice establishment; wetland restoration engineering and construction; engineering review and consultation; vegetation and landscape ecology; and soil science and soil conservation. The scope of this work involves a variety of advanced office and administrative support functions, including use of the Statewide Integrated Financial Tools (SWIFT) system for vendor establishment, easement encumbrances, receipts, payments and reporting; as well as data entry, management and reporting assistance for conservation easement acquisition files and wetland restoration project files. The scope of work also includes word processing and layout for correspondence, and administrative and technical documents; copying; filing; spreadsheet assistance; presentation development; meeting logistics and materials preparation; and other functions. The position holder works under the general supervision of the Conservation Easements Section Manager, with project and task direction often provided by section staff – in particular the Program Analyst - and the manager and staff of the Engineering Section.

## REPORTABILITY

Reports to: Conservation Easements Section Manager

Supervises: N/A

## DIMENSIONS

Budget: Not responsible for a budget. Provides skilled OAS support for budget management functions of the Conservation Easements and Engineering Sections.

Clientele: *Primary:* Managers and staff of the Conservation Easements Section and Engineering Section and other BWSR staff applicable to the function or task. The position will work closely with and take direction from the Conservation Easement Section Program Analyst for many of the tasks listed under Responsibility 1 below.  
*Secondary:* SWCD and other LGU staff, staff of other state and federal agencies, conservation organizations, program partners and the public.

## POSITION DESCRIPTION B

### RESPONSIBILITIES, TASKS, AND PERFORMANCE INDICATORS

- 1. Prepare and verify encumbrance, purchase and payment documents for Statewide Integrated Financial Tools (SWIFT) processing, in accordance with applicable state, BWSR and program policies and procedures.**

**Priority: A**

**Amount of Time: 60%**

**Discretion: A**

#### **Tasks:**

- Obtain vendor numbers for new accounts, in coordination with BWSR fiscal staff, to ensure accurate and timely obligation of program funds.
- Code requisitions and prepare and process encumbrance documents.
- Verify the validity and accuracy of invoices and program payment requests in coordination with program staff.
- Obtain approvals for payment from project and program staff.
- Coordinate with BWSR fiscal staff for SWIFT encumbrance and payment processing.
- Investigate errors or inconsistencies in process and recommend solutions to correct these, as well as modify processes and document changes to avoid recurrence.
- Prepare and process purchase requests, special expense requests and expense claims, including obtaining approval by Conservation Easements or Engineering Section managers and in coordination with BWSR administrative services and fiscal staff.
- Assist in the preparation of program financial reports.
- Serve as a point of contact to ensure that applicable state and BWSR policies and procedures are followed.

#### **Performance Indicators:**

- Requisition, encumbrance and payment documents and associated SWIFT processing are accurate, timely, and coordinated well with BWSR fiscal staff.
- Invoices and program payment requests are efficiently reviewed in coordination with applicable project and program staff.
- Purchase requests are approved by Conservation Easements and Engineering Section managers, and coordinated with BWSR administrative services and fiscal staff.
- Errors and inconsistencies are investigated and resolved with project and program staff and effective assistance is provided to identify process or document changes to avoid repeat problems.
- Assistance with program financial reporting is timely and reliable.
- Applicable state and BWSR policies and procedures are followed.

- 2. Provide advanced office and administrative support to staff of the Engineering and Conservation Easements Sections.**

**Priority: A**

**Amount of Time: 15%**

**Discretion: B**

#### **Tasks:**

- Assist Engineering and Conservation Easements Section managers and staff to draft, format, review, edit, and/or process correspondence, program and technical guidance documents, reports, articles, meeting notes, project construction specifications and other written materials, including assistance to compile information into charts, graphs and other visuals, using Microsoft Office, Adobe Acrobat or other software.

- b. Assist staff in copying and transmitting documents including project concept plans, reports, construction plans, specifications and bid documents to soil and water conservation districts and other program partners, and conservation easement program funding documents.
- c. Open and distribute applicable incoming mail and prepare out-going mail in coordination with other staff.
- d. Provide assistance for development of PowerPoint and other presentation materials for the Engineering and Conservation Easements Sections.
- e. Prepare agendas and information packets for meetings, training sessions and other events.
- f. Schedule and arrange meeting or training facilities; order visitor badges; provide call-in number and code for conference calls as requested; and assist with registrations. Make meeting or training session catering arrangements when necessary, applicable and authorized.
- g. Develop and/or help maintain contact information, such as names, titles, phone numbers and addresses (postal and email) for agencies, individuals, organizations, local government units, committees, and BWSR personnel for the Conservation Easements and Engineering Sections.
- h. Respond to phone calls, emails or hard copy requests for information, and provide independent research and response development for routine requests.
- i. Maintain office supplies, including copier and plotter paper, toner, ink cartridges and other supplies used by staff of the Conservation Easements and Engineering Sections.
- j. Coordinate outreach efforts including preparation and publication of RIM Rundown newsletter, and GovDelivery notifications including CREP tracking reminders.

**Performance Indicators:**

- (a) Assistance provided for development and processing of various types of documents, presentations and other materials is accurate, timely and is of high quality in spelling and grammar and is consistent with BWSR standards and policies.
- (b) Work product quality and speed reflect strong capabilities using Microsoft Office and other applicable software known by the position holder or learned on the job.
- (c) The position holder can work well with concurrent tasks and deadlines.
- (d) Assistance provided for meeting arrangements is accurate, timely and reflects good understanding of requestor needs and knowledge of logistics and constraints.
- (e) Contact information is accurate, timely and coordinated with other BWSR OAS staff.
- (f) Supplies used by staff of the Conservation Easements and Engineering Sections are well maintained.

**3. Assist Conservation Easements and Engineering staff to prepare, maintain and archive project files, maintain project tracking information and prepare associated status reports.**

**Priority: A**

**Amount of Time: 15%**

**Discretion: A**

**Tasks:**

- a. Assist with the development and maintenance of hard copy and electronic conservation easement and wetland restoration project files.
- b. Enter new and updated data into the conservation easement database.
- c. Establish and maintain other complex record systems based on substantial program knowledge.
- d. Assist with project status tracking and reporting.
- e. Assist with periodic hard copy project file cleanup and long-term electronic archiving, including organization, consolidation, scanning and data entry.

**Performance Indicators:**

- (a) Conservation easement and wetland restoration project file development and maintenance assistance is reliable and timely.

- (b) Database and spreadsheet data entry is timely and accurate.
- (c) Assistance provided for project status tracking reflects good understanding of requestor needs and timelines for completion and is accurate.
- (d) Reliable and consistent assistance is provided for the various tasks associated with project file cleanup and archiving.

**4. Provide other office and administrative specialist functions, as assigned, including functions to support program management and best utilize and develop position holder capabilities.**

**Priority: B**

**Amount of Time: 10%**

**Discretion: B**

**Tasks:**

- a. Assist Engineering Section with office and administrative functions associated with coordination of the interagency Drainage Management Team and other miscellaneous functions of the Conservation Easements and Engineering Sections.
- b. Provide other applicable support to assist Engineering and Conservation Easements Section managers and staff and advance position holder's professional development.
- c. Participate on the BWSR OAS work team and other BWSR teams as assigned.

**Performance Indicators:**

- (a) Assistance provided is reliable and timely.
- (b) Works well with Conservation Easements and Engineering Section managers and staff to identify and provide other effective OAS assistance, including development of skills and capabilities.
- (c) Participation on the BWSR OAS work team and other BWSR teams.

**Summary of Priorities, Percent of Time and Discretion**

<b>Responsibility</b>	<b>Priority</b>	<b>Percent of Time</b>	<b>Discretion</b>
1	A	60%	A
2	A	15%	B
3	A	15%	A
4	B	10%	B

**Definitions:**

*Priority A:* Results are essential and must be accomplished.

*Priority B:* Results are important and should be accomplished, but not at the expense of A priorities.

*Discretion Level A:* Employee investigates situation, makes decisions, takes appropriate action(s), and reports by exception through normal communication and review processes.

*Discretion Level B:* Employee investigates situation, makes decisions and confers with supervisor before, or immediately after, action is taken, depending on the nature of the situation and time sensitivity of action.

## **POSITION DESCRIPTION C**

### **RELATIONSHIPS**

The position reports to the Conservation Easements Section Manager for general direction and supervision and the Conservation Easements Program Analyst for day to day work direction. However, because this position assists both the Conservation Easements and Engineering Sections, specific direction for functions and tasks can come from managers and staff of both sections. The position holder must navigate these working relationships based on strong communication and coordination to have clear understandings of functions, tasks, and timelines, as well as applicable policies and procedures. The incumbent must develop and maintain effective working relationships with staff of the Engineering and Conservation Easements Sections and other BWSR staff and clientele indicated in Part A of this position description. Coordination with BWSR fiscal staff is also critical for the primary tasks of this position.

### **KNOWLEDGE, SKILLS AND ABILITIES**

The position requires substantial proficiency and applicable experience for various OAS functions and tasks, including invoice and payment request processing, word processing, document layout, data entry and reporting, file management, meeting planning, presentation development, use of office equipment, and other OAS functions. Knowledge of office and administrative management principles and practices, including applicable policies and procedures is required for efficient and effective operations. Advanced levels of knowledge, skills and abilities for use of Microsoft Office (including Outlook, Word, Excel, PowerPoint and Access) and Adobe Acrobat software are required, including keyboarding skills. It is essential that the individual has or efficiently develops a sound knowledge of the obligation and expenditure processes of the State and BWSR using the Statewide Integrated Financial Tools (SWIFT) system and attends appropriate training related to SWIFT as necessary. Because this position assists a substantial number of staff with diverse areas of expertise, strong organization and coordination abilities are necessary to concurrently manage a number of unrelated tasks and deadlines. Knowledge and skills in basic mathematics are required. Good spelling, grammar and composition skills are required. The position holder must have the ability to quickly understand written and oral instructions and guidance and to communicate and interact well with primary and secondary clientele. The ability to research a variety of topics, analyze data and develop clear responses and reports is necessary.

### **PROBLEM SOLVING**

This position requires self-motivation and resourcefulness to provide effective OAS assistance to a number of staff with diverse expertise. Creativity and flexibility are necessary to effectively assist Engineering and Conservation Easements Section managers and staff. The position holder has the opportunity and responsibility to help identify process or document revisions to avoid repeat problems and improve efficiency of operations. Timely and clear communication, including information sharing and process improvement recommendations are critical. The incumbent will refer to, and confer with, appropriate professional staff and/or the Conservation Easements and Engineering Section managers when problems arise beyond the authority and scope of this position.

### **FREEDOM TO ACT**

The position holder has freedom to act within the general direction of his/her supervisor and the staff to whom assistance is provided and within the applicable policies and procedures of the State, BWSR and programs. Resourcefulness is encouraged to determine the best way to accomplish assigned tasks; including coordination, consultation and approval by others. Independent decision making or consultation and approval depend on the scope and consequences of a decision and the established timeframes for certain actions, including payments and other financial transactions. The position holder is expected to utilize appropriate freedom to effectively organize and plan his/her work based on general direction.